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## 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

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# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

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Kara Grau, M.S.

7/31/2020

Prior to the effects of the COVID-19 pandemic, nonresident travelers would spend over \$3 billion in Montana each year. This report looks at how the money spent is distributed across the six Montana travel regions, as well as 16 of the 56 counties in the state which receive the highest spending, and is based on an average of 2018 and 2019 traveler spending data.

## **2019 Economic Contribution of Nonresident Travel Spending in Montana Regions and Counties**

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# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2020

## Abstract

Money spent by those traveling in Montana has an effect directly on the businesses where spending occurs, and it ripples throughout the state's economy from there. Statewide, spending by nonresidents (averaged over two years—2018 and 2019 data) totaled \$3.77 billion. This report details the methods and results of the economic impact analyses for each of Montana's travel regions, as well as analyses for counties in which nonresident travelers spent approximately \$50 million or more. This report is based on data collected prior to the onset of the COVID-19 pandemic, reflecting a level of nonresident travel spending that the travel industry will strive to reach again beyond 2020.

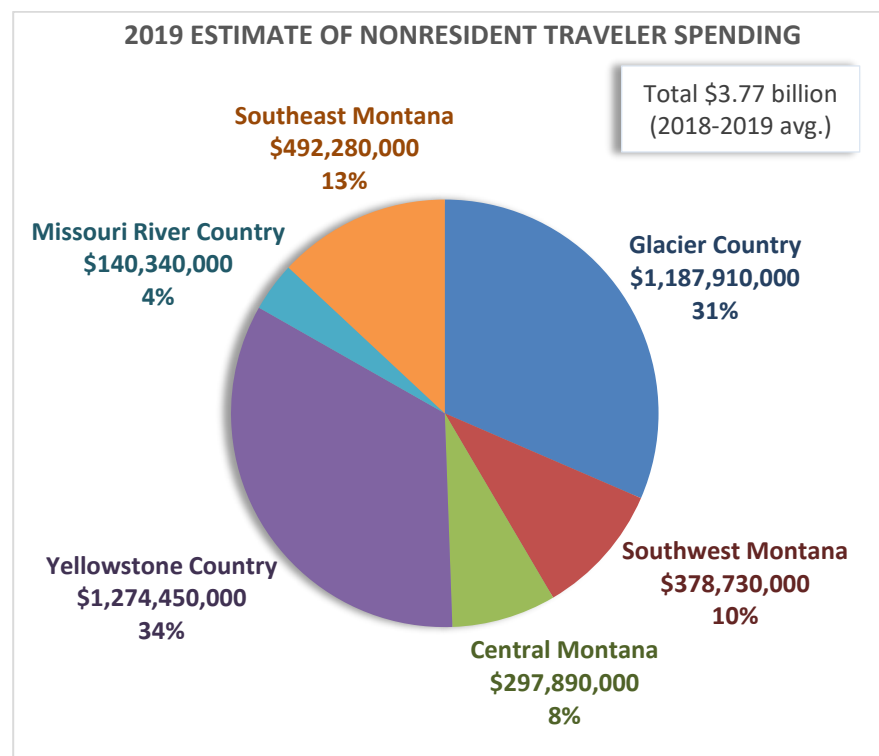
## Executive summary

Nonresident travelers spent \$3.77 billion throughout Montana during 2019 (estimate is an average of 2018 and 2019 nonresident spending). This was an increase (5.4%) from the previous year's spending estimate of \$3.58 billion (2017-2018 average).

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*Glacier and Yellowstone travel regions received the highest percentage of nonresident spending, 34% and 31%, respectively.*

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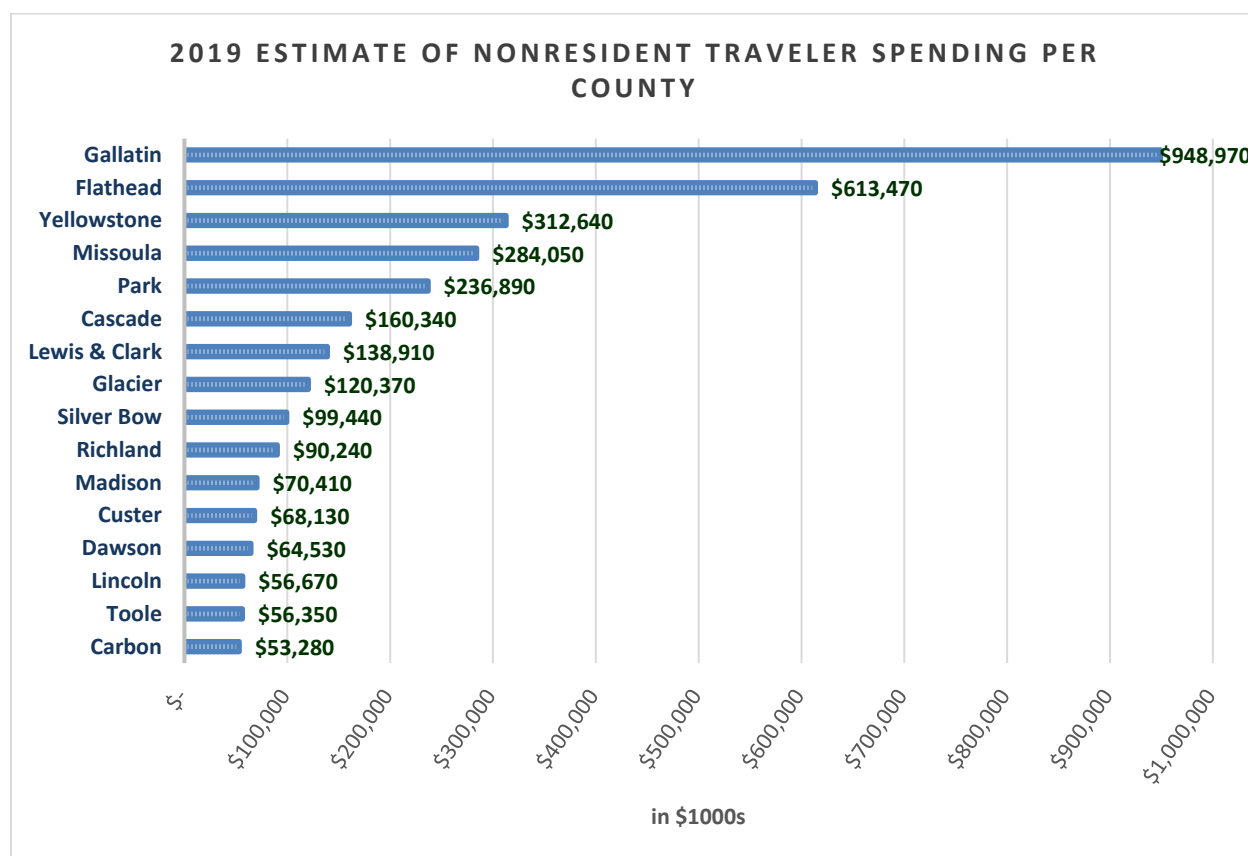


# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2020

*Of the 56 counties in Montana, Gallatin (\$948 million) and Flathead (\$613 million) Counties had the highest amount of spending.*

*Sixteen counties had high enough nonresident traveler spending (~\$50 million or greater) to allow for an economic impact analysis, the results of which are presented in the report.*



## Top 5 Counties – Spending, economic impact, and jobs supported by nonresident travel spending

- **Gallatin County** received \$984.9 million in direct spending from nonresident visitors with a total contribution to the regional economy of \$1.29 billion and over 14,600 total jobs.
- **Flathead County** received \$613.5 million in direct spending from nonresident visitors with a total contribution to the regional economy of \$847.2 million and over 9,800 total jobs.
- **Yellowstone County** received \$312.6 million in direct spending from nonresident visitors with a total contribution to the regional economy of \$401.1 million and nearly 3,500 total jobs.
- **Missoula County** received \$284.1 million in direct spending from nonresident visitors with a total contribution to the regional economy of \$360.1 million and nearly 3,800 total jobs.
- **Park County** received \$236.9 million in direct spending from nonresident visitors with a total contribution to the regional economy of \$248.6 million and nearly 3,300 total jobs.

# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

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# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

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## Introduction

Nonresident spending is a significant contributor to Montana's economy. Money spent by those traveling to and through the state has an effect not only on the businesses where spending occurs, but it ripples throughout Montana's economy, both locally and regionally. Economic impact analysis allows us to observe the direct and indirect effects of the money spent by nonresident travelers in terms of the economic activity supported by this spending, and the number of jobs and labor income attributable to this spending, as well. This report is comprised of a collection of economic impact analyses for each of Montana's six travel regions, as well as 16 of the 56 counties in the state.

## Methods

### Expenditure Data

Nonresident spending data is collected at the statewide level, and estimates are based on average daily spending of visitor groups and the estimated number of visitor groups to Montana each year. To estimate the total spending at the county and region level, the reported spending patterns within each expenditure category are observed for each county in the state, and the state total spending amount is allocated to the counties appropriately.

**Table 1 – 2018-2019 Average Nonresident Spending per Expenditure Category**

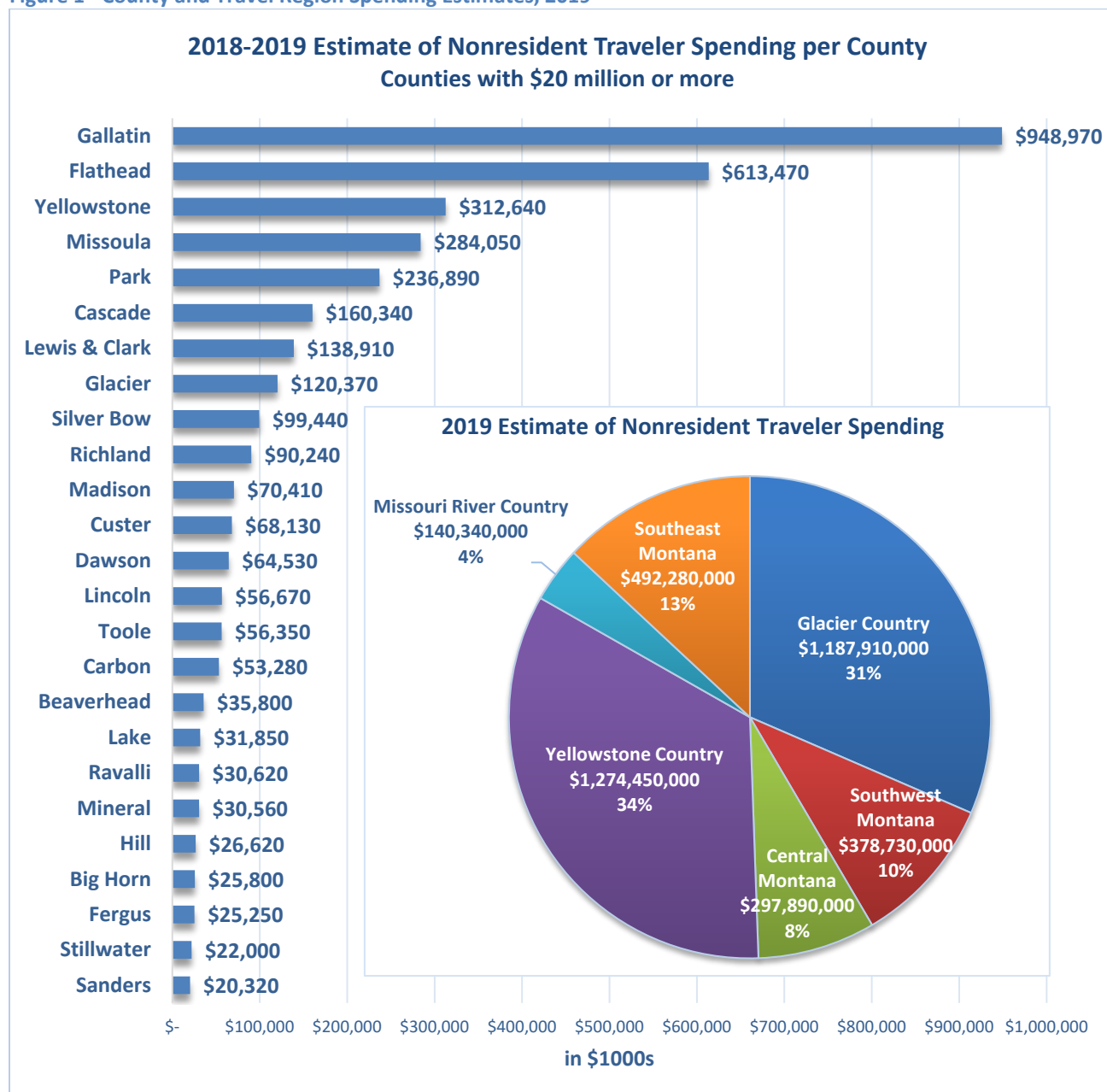
Expenditure Category	2018-2019 Avg. Total Nonresident Spending (2019 \$s)
Gasoline, Diesel	\$856,744,000
Restaurant, Bar	\$679,763,000
Hotel, Motel	\$476,563,000
Outfitter, Guide	\$395,813,000
Retail sales	\$353,865,000
Groceries, Snacks	\$291,704,000
Licenses, Entrance Fees	\$230,518,000
Auto Rental	\$144,569,000
Rental cabin, Condo	\$116,987,000
Made in Montana	\$88,306,000
Campground, RV Park	\$48,007,000
Vehicle Repairs	\$32,599,000
Misc. Services	\$34,217,000
Gambling	\$14,243,000
Farmers Market	\$6,924,000
Transp. Fares	\$783,000
<b>TOTAL</b>	<b>\$3,771,605,000</b>

# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2020

The statewide total 2018-2019 average spending is presented in Table 1. For the analyses highlighted in this report, the 2018 (inflation adjusted to 2019 \$s) and 2019 county spending estimates were averaged. Doing so helps to account for small sample sizes within some counties and within some spending categories, and the variations in county spending patterns that may occur from year to year because of these small sample sizes. Figure 1 displays total spending in the counties which received an estimated \$20 million or more in nonresident traveler spending. Total spending in the six travel regions is also included.

Figure 1 - County and Travel Region Spending Estimates, 2019





# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties **2020**

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Presented in the following figures are the estimates of spending within the various expenditure categories by nonresidents for each of the selected counties (those in which nonresidents spent approximately \$50 million or more) and travel regions. IMPLAN economic modeling software was used to estimate the economic impact of nonresident spending within each of the six travel regions. Additionally, estimates were produced for 16 of Montana's counties which had samples large enough to do so. To clarify, "nonresident spending" indicates money spent by travelers who do not have a permanent residence within Montana. It does not include Montana residents traveling within the state who may have spent money in a county other than the one in which they reside.

## **IMPLAN Analysis**

An IMPLAN model was created for each of the 16 counties and six travel regions. Industry sectors corresponding to the expenditure categories were used in the models, and the dollar amounts for each county and region were input into the respective models accordingly.

The following 21 figures represent summaries for the individual counties and regions. Included in each summary is the estimated two-year average spending within each category and the economic impact within the county or region of that spending. The direct, indirect, induced and combined effects are included to provide a clear illustration of the ripple effect of nonresident spending at the local or regional scale.

In some cases, the economic impact to industry output (the value of goods and services produced by an industry which nonresidents purchase) is a smaller sum than the total amount of spending in a county or region. This is to be expected. On a regional basis, and particularly at the county level, much of the money spent in the area "leaks out." Generally, fewer industries exist at the local level than at the state level. Therefore, many supplies and goods must be purchased outside the local area, and can be considered imports. Hence, the dollar amount spent will not equal the Direct Industry Output figure unless everything required to produce the goods and services purchased by nonresident travelers is available within the region. This is particularly noticeable when looking at county level economic impacts, in which case much of the money spent within a county is leakage, and does not contribute to the impact.

## **Regions & Counties Included**

The following regions are included in this report: Central Montana, Glacier Country, Missouri River Country, Southeast Montana, Southwest Montana, and Yellowstone Country.

The following counties are included: Carbon, Cascade, Custer, Dawson, Flathead, Gallatin, Glacier, Lewis and Clark, Lincoln, Madison, Missoula, Park, Richland, Silver Bow, Toole and Yellowstone. Other counties totaled less than \$50 million in nonresident spending, and were, therefore, not analyzed.

# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2020

## Conclusions & Recommendations

The reader must be aware that the estimates presented on the following pages are just that – estimates of nonresident traveler spending. It is not possible to collect actual figures of total spending by nonresidents throughout the year at each establishment, or within each industry, in the state.

Therefore, estimates of spending are generated by ITRR based on both primary and secondary data.

Survey data collected around the state throughout the year provide insight into average spending patterns and dollar amounts by travel groups. This data, combined with estimates of total visitation to the state, allow for the statewide, region, and county spending estimates to be produced. Sample sizes can vary from year to year within regions, as can the spending patterns of those respondents captured in the sample. This can result in significant variation year-to-year, and readers are urged to use caution when comparing the estimates in this report to any previous or forthcoming estimates of nonresident traveler spending.

# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

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## Montana Travel Regions – 2019 Nonresident Economic Impacts

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Glacier Country - 7

Missouri River Country - 8

Southeast Montana - 9

Southwest Montana - 10

Yellowstone Country - 11

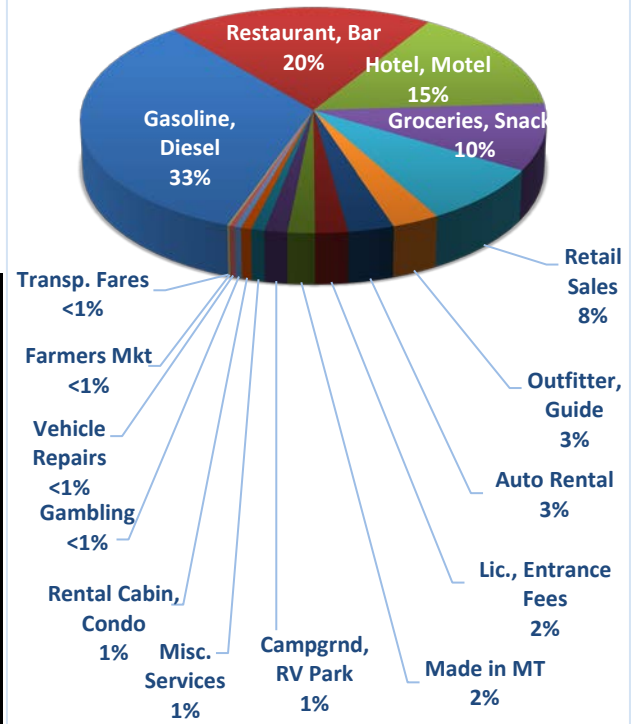
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Central Montana Travel Region

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Central Montana Travel Region



### 2019 Nonresident Expenditure Percentages in Central Montana Travel Region



**Table 1 - Total Nonresident Spending in Central Montana\***

Gasoline, Diesel	\$99,354,000	Made in MT	\$5,187,000
Restaurant, Bar	\$59,640,000	Campgrnd, RV Park	\$4,359,000
Hotel, Motel	\$44,883,000	Misc. Services	\$2,525,000
Groceries, Snacks	\$28,620,000	Rental Cabin, Condo	\$1,969,000
Retail Sales	\$24,410,000	Gambling	\$1,263,000
Outfitter, Guide	\$9,073,000	Vehicle Repairs	\$1,059,000
Auto Rental	\$8,801,000	Farmers Mkt	\$369,000
Lic., Entrance Fees	\$6,248,000	Transp. Fares	\$126,000
<b>TOTAL</b>		<b>\$297,886,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Central Montana Travel Region

- 2019 average spending\* in Central Montana by nonresident visitors to Montana totaled \$297.9 million.
- This \$297.9 million in local spending directly supports \$236.0 million of economic activity in the region, and supports an additional \$126.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$362.5 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$235,957,000	\$70,093,000	\$56,464,000	\$362,514,000
Employment (# of jobs)	2,750	450	430	3,630
Employee Compensation	\$58,858,000	\$14,684,000	\$14,541,000	\$88,083,000
Proprietor Income	\$9,723,000	\$3,547,000	\$2,522,000	\$15,792,000
Other Property Type Income	\$27,456,000	\$10,146,000	\$10,884,000	\$48,486,000
State & Local Taxes <sup>^</sup>	—	—	—	\$21,238,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

♦Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

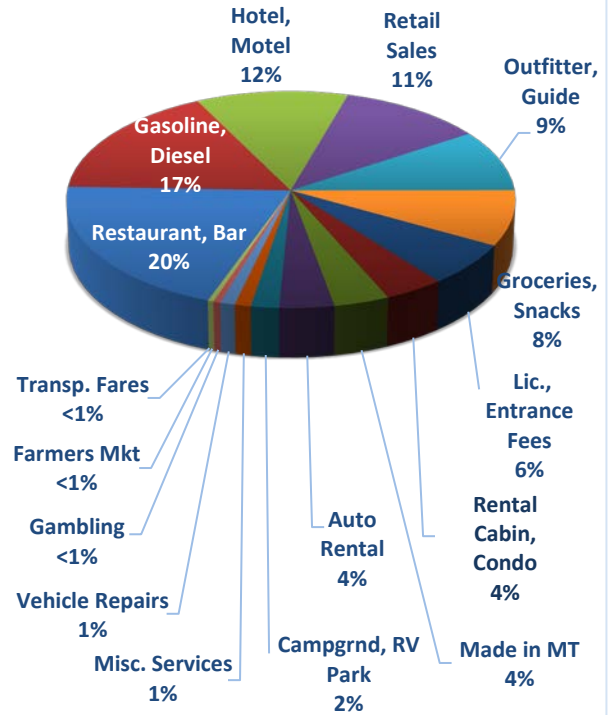
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Glacier Country Travel Region

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Glacier Country Travel Region



### 2019 Nonresident Expenditure Percentages in Glacier Country Travel Region



**Table 1 - Total Nonresident Spending in Glacier Country\*<sup>0</sup>**

Restaurant, Bar	\$237,619,000	Made in MT	\$43,964,000
Gasoline, Diesel	\$202,243,000	Auto Rental	\$43,188,000
Hotel, Motel	\$141,357,000	Campground, RV Park	\$22,171,000
Retail Sales	\$133,400,000	Misc. Services	\$12,709,000
Outfitter, Guide	\$109,814,000	Vehicle Repairs	\$11,725,000
Groceries, Snacks	\$97,672,000	Gambling	\$5,591,000
Lic., Entrance Fees	\$74,190,000	Farmers Market	\$4,511,000
Rental Cabin, Condo	\$47,428,000	Transportation Fares	\$328,000
<b>TOTAL</b>		<b>\$1,187,910,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Glacier Country Travel Region

- 2019 average spending\* in Glacier Country by nonresident visitors to Montana totaled \$1.19 billion.
- This \$1.19 billion in local spending directly supports \$900.7 million of economic activity in the region, and supports an additional \$677.1 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.58 billion.

**Table 2 - 2019 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$900,663,000	\$335,131,000	\$341,998,000	\$1,577,792,000
Employment (# of jobs)	12,710	2,510	2,710	17,930
Employee Compensation	\$315,167,000	\$69,428,000	\$91,175,000	\$475,770,000
Proprietor Income	\$40,861,000	\$20,778,000	\$18,257,000	\$79,896,000
Other Property Type Income	\$88,076,000	\$44,630,000	\$60,374,000	\$193,080,000
State & Local Taxes <sup>^</sup>	—	—	—	\$80,583,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.

# 2019 Nonresident Traveler Expenditures & Economic Contribution in Missouri River Country Travel Region

by Kara Grau, M.S.

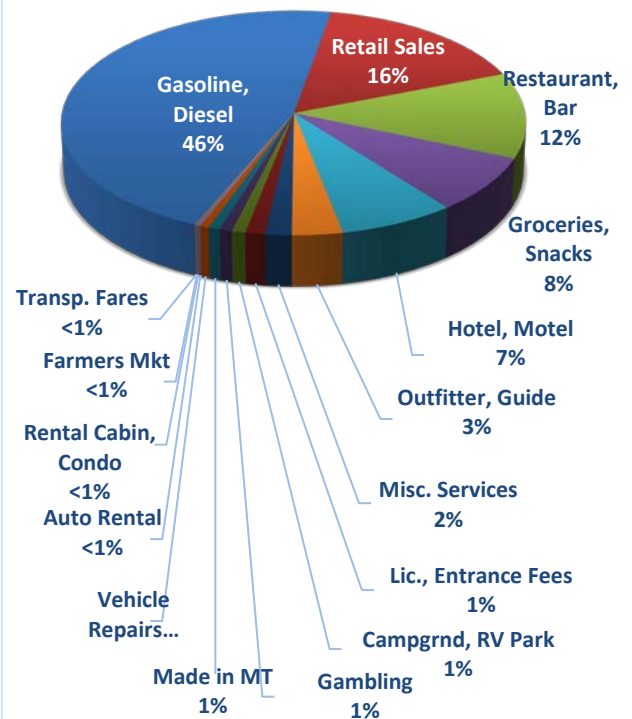
## 2019 Nonresident Traveler Expenditures in Missouri River Country Travel Region



**Table 1 - Total Nonresident Spending in Missouri River Country\*,<sup>0</sup>**

Gasoline, Diesel	\$65,119,000	Campground, RV Park	\$1,226,000
Retail Sales	\$22,894,000	Gambling	\$1,091,000
Restaurant, Bar	\$17,323,000	Made in MT	\$1,047,000
Groceries, Snacks	\$11,279,000	Vehicle Repairs	\$808,000
Hotel, Motel	\$10,424,000	Auto Rental	\$226,000
Outfitter, Guide	\$4,524,000	Rental Cabin, Condo	\$202,000
Misc. Services	\$2,374,000	Farmers Market	\$53,000
Lic., Entrance Fees	\$1,751,000	Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$140,341,000</b>	

**2019 Nonresident Expenditure Percentages in Missouri River Country Travel Region**



## 2019 Contribution of Nonresident Traveler Expenditures in Missouri River Country Travel Region

- 2019 average spending\* in Missouri River Country by nonresident visitors to Montana totaled \$140.3 million.
- This \$140.3 million in local spending directly supports \$101.3 million of economic activity in the region, and supports an additional \$38.1 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$139.4 million.

**Table 2 - 2019 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$101,300,000	\$21,077,000	\$17,058,000	\$139,435,000
Employment (# of jobs)	860	120	130	1,110
Employee Compensation	\$22,241,000	\$4,261,000	\$4,047,000	\$30,549,000
Proprietor Income	\$4,765,000	\$1,244,000	\$790,000	\$6,799,000
Other Property Type Income	\$10,072,000	\$846,000	\$3,112,000	\$14,030,000
State & Local Taxes <sup>^</sup>	—	—	—	\$8,595,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.



by Kara Grau, M.S.

## A map of Montana showing its 56 counties. The counties in the southeastern portion of the state are highlighted in light blue. These counties are: Musselshell, Wheatland, Golden Valley, Yellowstone, Treasure, Rosebud, Custer, Big Horn, Powder River, and Carter. A white rectangular box with a black border is placed over the southeastern part of the map, containing the text "Southeast Montana". The names of the other 47 counties are labeled in black capital letters on a white background.

Gasoline, Diesel	\$178,028,000	Made in MT	\$5,978,000
Hotel, Motel	\$75,697,000	Vehicle Repairs	\$5,143,000
Restaurant, Bar	\$72,530,000	Misc. Services	\$3,896,000
Retail Sales	\$64,582,000	Campground, RV Park	\$3,434,000
Groceries, Snacks	\$34,947,000	Gambling	\$2,653,000
Auto Rental	\$22,027,000	Rental Cabin, Condo	\$1,040,000
Outfitter, Guide	\$15,673,000	Farmers Market	\$181,000
Lic., Entrance Fees	\$6,315,000	Transportation Fares	\$155,000
<b>TOTAL</b>			<b>\$492,279,000</b>

Category	Percentage
Gasoline, Diesel	36%
Hotel, Motel	15%
Restaurant, Bar	15%
Retail Sales	13%
Groceries, Snacks	7%
Auto Rental	4%
Outfitter, Guide	3%
Lic., Entrance Fees	1%
Made in MT	1%
Vehicle Repairs	1%
Misc. Services	1%
Campgrnd, RV Park	1%
Gambling	1%
Rental Cabin, Condo	<1%
Farmers Mkt	<1%
Transp. Fares	<1%

- The total contribution of nonresident spending to the regional economy was \$627.7 million.

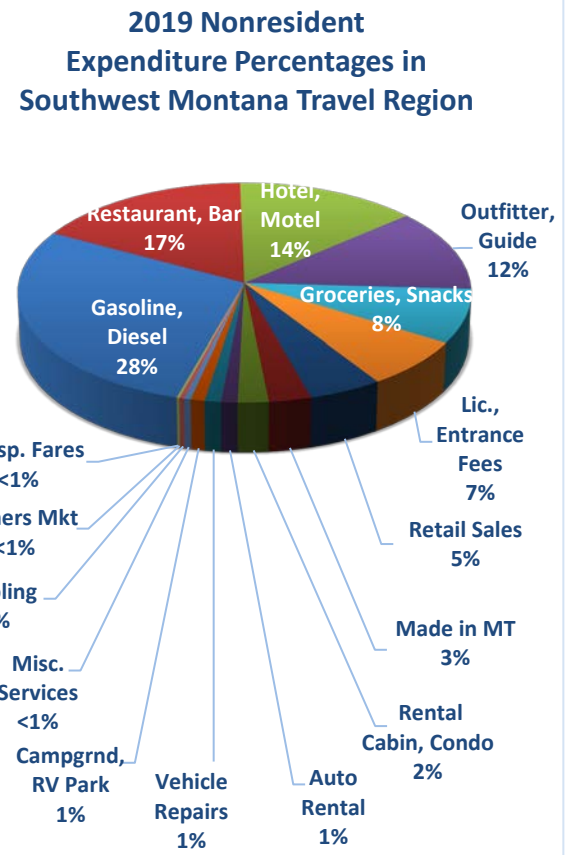
Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$393,126,000	\$127,311,000	\$107,291,000	\$627,728,000
Employment (# of jobs)	3,710	750	780	5,240
Employee Compensation	\$100,506,000	\$27,697,000	\$29,482,000	\$157,685,000
Proprietor Income	\$12,456,000	\$8,506,000	\$4,927,000	\$25,889,000
Other Property Type Income	\$55,817,000	\$18,931,000	\$18,563,000	\$93,311,000
State & Local Taxes^	—	—	—	\$30,286,000

♦Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

# 2019 Nonresident Traveler Expenditures & Economic Contribution in Southwest Montana Travel Region

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Southwest Montana Travel Region



**Table 1 - Total Nonresident Spending in Southwest Montana<sup>\*,0</sup>**

Gasoline, Diesel	\$107,689,000	Rental Cabin, Condo	\$7,637,000
Restaurant, Bar	\$63,586,000	Auto Rental	\$4,079,000
Hotel, Motel	\$53,112,000	Vehicle Repairs	\$4,056,000
Outfitter, Guide	\$46,149,000	Campground, RV Park	\$3,457,000
Groceries, Snacks	\$30,053,000	Misc. Services	\$1,617,000
Lic., Entrance Fees	\$26,395,000	Gambling	\$1,241,000
Retail Sales	\$18,343,000	Farmers Market	\$662,000
Made in MT	\$10,577,000	Transportation Fares	\$82,000
<b>TOTAL</b>		<b>\$378,735,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Southwest Montana Travel Region

- 2019 average spending\* in Southwest Montana by nonresident visitors to Montana totaled \$378.7 million.
- This \$378.7 million in local spending directly supports \$256.7 million of economic activity in the region, and supports an additional \$162.2 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$418.9 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$256,659,000	\$80,498,000	\$81,696,000	\$418,853,000
Employment (# of jobs)	3,850	600	640	5,090
Employee Compensation	\$93,185,000	\$16,528,000	\$20,940,000	\$130,653,000
Proprietor Income	\$13,851,000	\$5,060,000	\$4,426,000	\$23,337,000
Other Property Type Income	\$23,636,000	\$10,458,000	\$15,110,000	\$49,204,000
State & Local Taxes <sup>^</sup>	—	—	—	\$20,402,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.



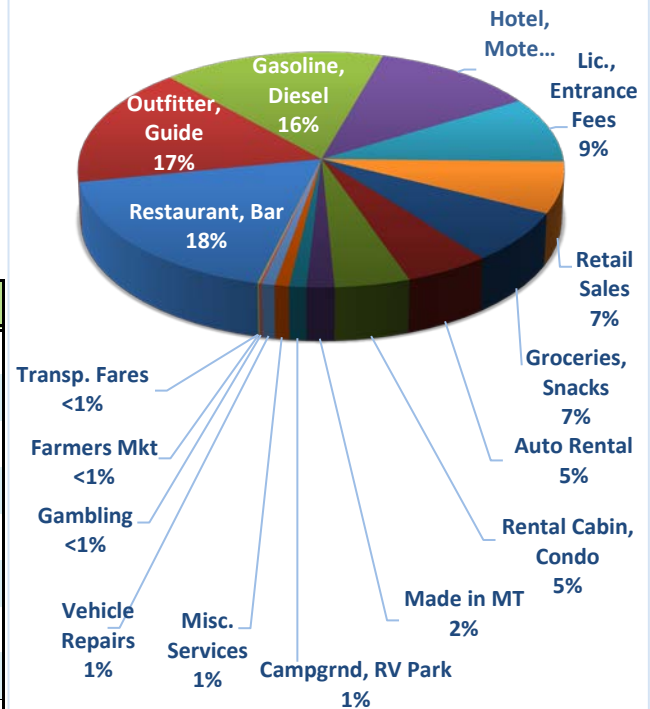
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone Country Travel Region

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Yellowstone Country Travel Region



### 2019 Nonresident Expenditure Percentages in Yellowstone Country Travel Region



**Table 1 - Total Nonresident Spending in Yellowstone Country\***

Restaurant, Bar	\$229,065,000	Rental Cabin, Condo	\$58,710,000
Outfitter, Guide	\$210,579,000	Made in MT	\$21,554,000
Gasoline, Diesel	\$204,311,000	Campground, RV Park	\$13,360,000
Hotel, Motel	\$151,090,000	Misc. Services	\$11,096,000
Lic., Entrance Fees	\$115,619,000	Vehicle Repairs	\$9,807,000
Retail Sales	\$90,236,000	Gambling	\$2,404,000
Groceries, Snacks	\$89,133,000	Farmers Market	\$1,148,000
Auto Rental	\$66,249,000	Transportation Fares	\$92,000
<b>TOTAL</b>		<b>\$1,274,453,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Yellowstone Country Travel Region

- 2019 average spending\* in Yellowstone Country by nonresident visitors to Montana totaled \$1.27 billion.
- This \$1.27 billion in local spending directly supports \$1.0 billion of economic activity in the region, and supports an additional \$666.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.68 billion.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$1,011,735,000	\$322,668,000	\$343,924,000	\$1,678,327,000
Employment (# of jobs)	14,170	2,430	2,690	19,290
Employee Compensation	\$388,571,000	\$71,469,000	\$91,619,000	\$551,659,000
Proprietor Income	\$58,971,000	\$23,654,000	\$20,692,000	\$103,317,000
Other Property Type Income	\$89,603,000	\$45,351,000	\$64,606,000	\$199,560,000
State & Local Taxes <sup>^</sup>	—	—	—	\$81,570,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

♦Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2020

## Montana Counties – 2019 Nonresident Economic Impacts

<b>Carbon County - 13</b>
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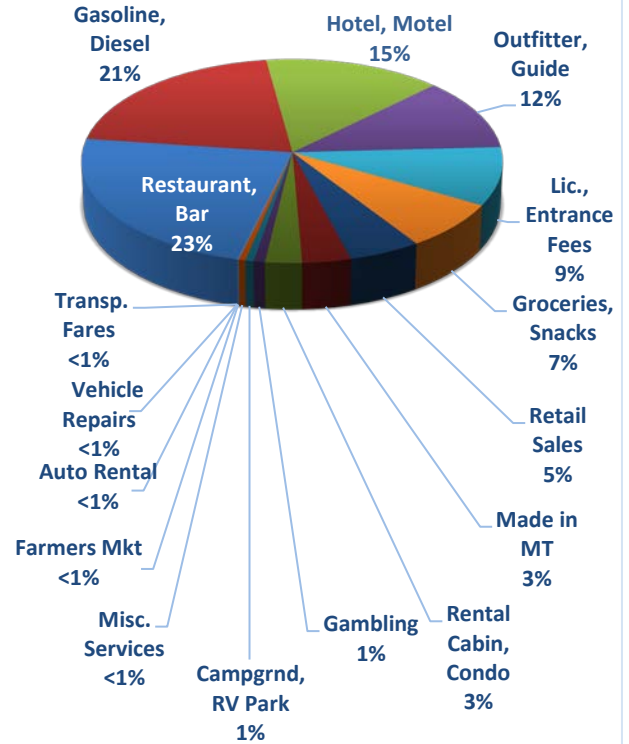
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Carbon County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Carbon County



### 2019 Nonresident Expenditure Percentages in Carbon County



**Table 1 - Total Nonresident Spending in Carbon County\*<sup>0</sup>**

Restaurant, Bar	\$12,397,000	Rental Cabin, Condo	\$1,372,000
Gasoline, Diesel	\$11,014,000	Gambling	\$427,000
Hotel, Motel	\$7,874,000	Campground, RV Park	\$313,000
Outfitter, Guide	\$6,152,000	Misc. Services	\$245,000
Lic., Entrance Fees	\$4,913,000	Farmers Market	\$70,000
Groceries, Snacks	\$3,939,000	Auto Rental	Insufficient Sample Size
Retail Sales	\$2,726,000	Transportation Fares	Insufficient Sample Size
Made in MT	\$1,833,000	Vehicle Repairs	Insufficient Sample Size
<b>TOTAL</b>		<b>\$53,275,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Carbon County

- 2019 average spending\* in Carbon County by nonresident visitors to Montana totaled \$53.3 million.
- This \$53.3 million in local spending directly supports \$43.7 million of economic activity in the region, and supports an additional \$19.6 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$63.3 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$43,688,000	\$11,937,000	\$7,712,000	\$63,337,000
Employment (# of jobs)	660	110	70	840
Employee Compensation	\$15,433,000	\$1,539,000	\$1,425,000	\$18,397,000
Proprietor Income	\$1,703,000	\$920,000	\$367,000	\$2,990,000
Other Property Type Income	\$3,042,000	\$903,000	\$1,532,000	\$5,477,000
State & Local Taxes <sup>^</sup>	—	—	—	\$2,766,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

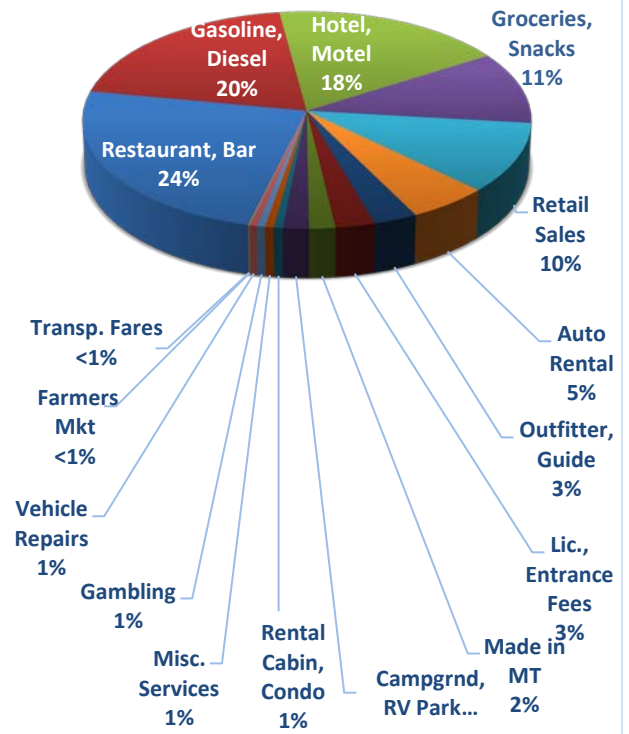
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Cascade County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Cascade County



### 2019 Nonresident Expenditure Percentages in Cascade County



**Table 1 - Total Nonresident Spending in Cascade County\***

Restaurant, Bar	\$38,555,000	Made in MT	\$2,786,000
Gasoline, Diesel	\$31,983,000	Campground, RV Park	\$2,764,000
Hotel, Motel	\$29,114,000	Rental Cabin, Condo	\$941,000
Groceries, Snacks	\$17,228,000	Misc. Services	\$922,000
Retail Sales	\$16,661,000	Gambling	\$862,000
Auto Rental	\$8,627,000	Vehicle Repairs	\$816,000
Outfitter, Guide	\$4,661,000	Farmers Market	\$98,000
Lic., Entrance Fees	\$4,241,000	Transportation Fares	\$81,000
<b>TOTAL</b>		<b>\$160,340,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Cascade County

- 2019 average spending\* in Cascade County by nonresident visitors to Montana totaled \$160.3 million.
- This \$160.3 million in local spending directly supports \$131.1 million of economic activity in the region, and supports an additional \$80.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$212.0 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$131,095,000	\$40,647,000	\$40,257,000	\$211,999,000
Employment (# of jobs)	1,640	280	300	2,220
Employee Compensation	\$36,033,000	\$10,028,000	\$11,177,000	\$57,238,000
Proprietor Income	\$4,557,000	\$1,976,000	\$1,694,000	\$8,227,000
Other Property Type Income	\$17,958,000	\$4,654,000	\$6,928,000	\$29,540,000
State & Local Taxes^	—	—	—	\$8,524,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

♦Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

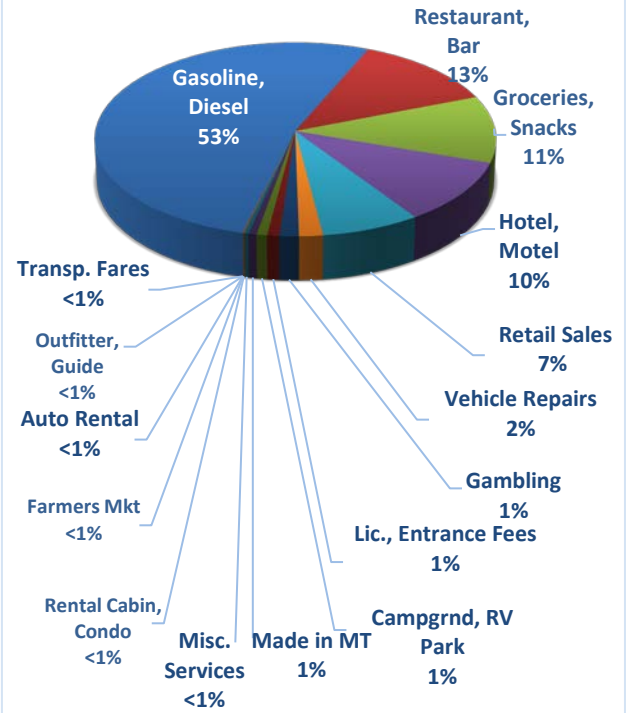
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Custer County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Custer County



### 2019 Nonresident Expenditure Percentages in Custer County



**Table 1 - Total Nonresident Spending in Custer\***

Gasoline, Diesel	\$35,824,000	Campground, RV Park	\$525,000
Restaurant, Bar	\$8,576,000	Made in MT	\$414,000
Groceries, Snacks	\$7,610,000	Misc. Services	\$222,000
Hotel, Motel	\$7,059,000	Rental Cabin, Condo	\$73,000
Retail Sales	\$5,018,000	Farmers Market	\$13,000
Vehicle Repairs	\$1,204,000	Auto Rental	Insufficient Sample Size
Gambling	\$970,000	Outfitter, Guide	Insufficient Sample Size
Lic., Entrance Fees	\$622,000	Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$68,130,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Custer County

- 2019 average spending\* in Custer County by nonresident visitors to Montana totaled \$68.1 million.
- This \$68.1 million in local spending directly supports \$32.0 million of economic activity in the region, and supports an additional \$17.0 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$49.0 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$31,979,000	\$7,441,000	\$9,597,000	\$49,017,000
Employment (# of jobs)	1,640	280	300	2,220
Employee Compensation	\$9,546,000	\$1,578,000	\$2,393,000	\$13,517,000
Proprietor Income	\$3,150,000	\$598,000	\$516,000	\$4,264,000
Other Property Type Income	\$2,625,000	\$819,000	\$1,797,000	\$5,241,000
State & Local Taxes <sup>^</sup>	—	—	—	\$3,170,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

♦Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.



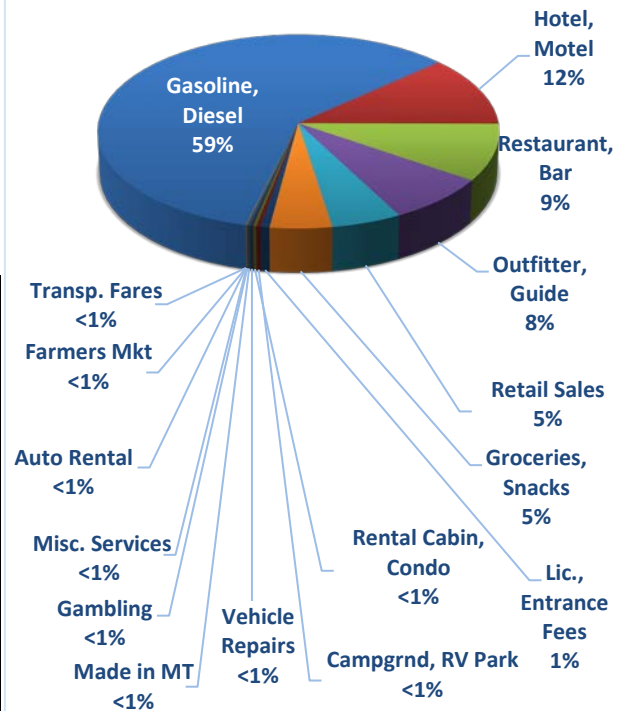
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Dawson County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Dawson County



### 2019 Nonresident Expenditure Percentages in Dawson County



**Table 1 - Total Nonresident Spending in Dawson<sup>\*,0</sup>**

Gasoline, Diesel	\$38,364,000	Rental Cabin, Condo	\$156,000
Hotel, Motel	\$7,583,000	Vehicle Repairs	\$139,000
Restaurant, Bar	\$6,117,000	Made in MT	\$131,000
Outfitter, Guide	\$4,966,000	Gambling	\$51,000
Retail Sales	\$3,379,000	Misc. Services	\$47,000
Groceries, Snacks	\$2,969,000	Auto Rental	Insufficient Sample Size
Lic., Entrance Fees	\$426,000	Farmers Market	Insufficient Sample Size
ampground, RV Park	\$205,000	Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$64,533,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Dawson County

- 2019 average spending\* in Dawson County by nonresident visitors to Montana totaled \$64.5 million.
- This \$64.5 million in local spending directly supports \$34.1 million of economic activity in the region, and supports an additional \$14.3 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$4.2 million.

**Table 2 - 2019 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$34,127,000	\$7,300,000	\$7,031,000	\$48,458,000
Employment (# of jobs)	430	50	60	540
Employee Compensation	\$11,328,000	\$1,635,000	\$1,788,000	\$14,751,000
Proprietor Income	\$1,107,000	\$388,000	\$237,000	\$1,732,000
Other Property Type Income	\$2,346,000	\$915,000	\$1,484,000	\$4,745,000
State & Local Taxes <sup>^</sup>	—	—	—	\$4,220,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

# 2019 Nonresident Traveler Expenditures & Economic Contribution in Flathead County

by Kara Grau, M.S.

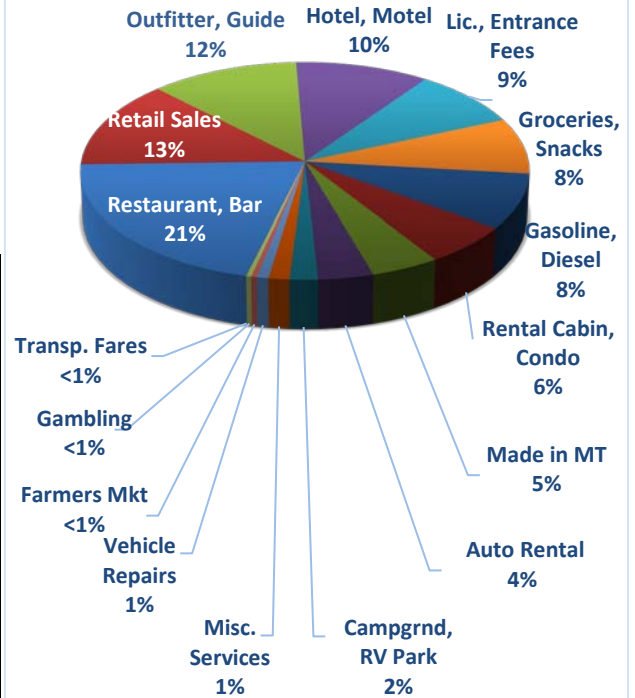
## 2019 Nonresident Traveler Expenditures in Flathead County



**Table 1 - Total Nonresident Spending in Flathead County<sup>\*,0</sup>**

Restaurant, Bar	\$126,892,000	Made in MT	\$27,955,000
Retail Sales	\$80,387,000	Auto Rental	\$22,518,000
Outfitter, Guide	\$71,450,000	Campground, RV Park	\$11,480,000
Hotel, Motel	\$64,121,000	Misc. Services	\$8,486,000
Lic., Entrance Fees	\$53,277,000	Vehicle Repairs	\$4,752,000
Groceries, Snacks	\$51,087,000	Farmers Market	\$2,282,000
Gasoline, Diesel	\$50,445,000	Gambling	\$2,026,000
Rental Cabin, Condo	\$36,141,000	Transportation Fares	\$172,000
<b>TOTAL</b>		<b>\$613,471,000</b>	

## 2019 Nonresident Expenditure Percentages in Flathead County



## 2019 Contribution of Nonresident Traveler Expenditures in Flathead County

- 2019 average spending\* in Flathead County by nonresident visitors to Montana totaled \$613.5 million.
- This \$613.5 million in local spending directly supports \$493.0 million of economic activity in the region, and supports an additional \$354.3 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$847.2 million.

**Table 2 - 2019 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$492,968,000	\$168,613,000	\$185,664,000	\$847,245,000
Employment (# of jobs)	7,100	1,290	1,480	9,870
Employee Compensation	\$191,803,000	\$33,020,000	\$50,308,000	\$275,131,000
Proprietor Income	\$15,790,000	\$12,967,000	\$11,006,000	\$39,763,000
Other Property Type Income	\$47,091,000	\$21,427,000	\$30,677,000	\$99,195,000
State & Local Taxes <sup>^</sup>	—	—	—	\$40,049,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

# 2019 Nonresident Traveler Expenditures & Economic Contribution in Gallatin County

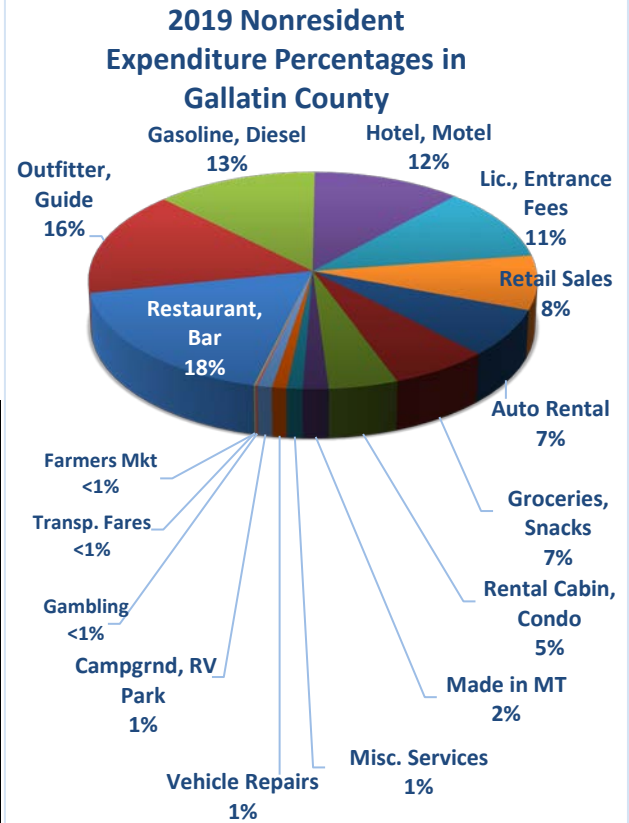
by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Gallatin County



**Table 1 - Total Nonresident Spending in Gallatin County\*<sup>0</sup>**

Restaurant, Bar	\$169,704,000	Rental Cabin, Condo	\$43,781,000
Outfitter, Guide	\$149,177,000	Made in MT	\$16,217,000
Gasoline, Diesel	\$120,179,000	Misc. Services	\$10,026,000
Hotel, Motel	\$110,156,000	Vehicle Repairs	\$9,171,000
Lic., Entrance Fees	\$103,386,000	Campground, RV Park	\$8,995,000
Retail Sales	\$76,931,000	Gambling	\$1,507,000
Auto Rental	\$66,249,000	Farmers Market	\$903,000
Groceries, Snacks	\$62,497,000	Transportation Fares	\$92,000
<b>TOTAL</b>		<b>\$948,971,000</b>	



## 2019 Contribution of Nonresident Traveler Expenditures in Gallatin County

- 2019 average spending\* in Gallatin County by nonresident visitors to Montana totaled \$948.9 million.
- This \$948.9 million in local spending directly supports \$773.5 million of economic activity in the region, and supports an additional \$542.9 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$1.29 billion.

**Table 2 - 2019 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$773,548,000	\$246,533,000	\$278,427,000	\$1,298,508,000
Employment (# of jobs)	10,650	1,830	2,140	14,620
Employee Compensation	\$296,559,000	\$56,247,000	\$77,252,000	\$430,058,000
Proprietor Income	\$47,306,000	\$17,841,000	\$17,118,000	\$82,265,000
Other Property Type Income	\$72,110,000	\$36,382,000	\$52,269,000	\$160,761,000
State & Local Taxes <sup>^</sup>	—	—	—	\$62,428,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.



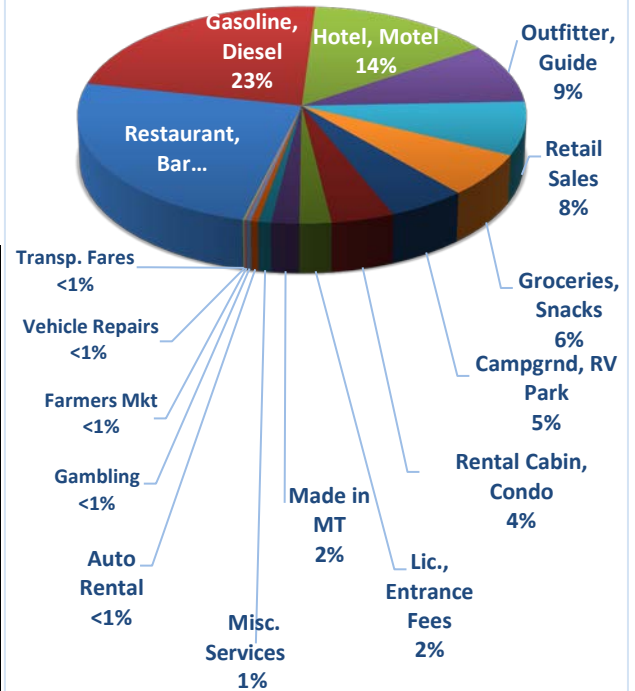
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Glacier County

by Kara Grau, M.S.

## 2016 Nonresident Traveler Expenditures in Glacier County



## 2019 Nonresident Expenditure Percentages in Glacier County



**Table 1 - Total Nonresident Spending in Glacier County\*<sup>0</sup>**

Restaurant, Bar	\$29,484,000	Lic., Entrance Fees	\$2,550,000
Gasoline, Diesel	\$27,291,000	Made in MT	\$2,245,000
Hotel, Motel	\$17,384,000	Misc. Services	\$1,023,000
Outfitter, Guide	\$10,658,000	Auto Rental	\$580,000
Retail Sales	\$9,546,000	Gambling	\$344,000
Groceries, Snacks	\$7,636,000	Farmers Market	\$165,000
campground, RV Park	\$6,267,000	Vehicle Repairs	\$133,000
Rental Cabin, Condo	\$5,055,000	Transportation Fares	\$7,000
<b>TOTAL</b>		<b>\$120,368,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Glacier County

- 2019 average spending\* in Glacier County by nonresident visitors to Montana totaled \$120.4 million.
- This \$120.4 million in local spending directly supports \$84.3 million of economic activity in the region, and supports an additional \$25.4 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$109.7 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$84,266,000	\$14,271,000	\$11,134,000	\$109,671,000
Employment (# of jobs)	1,150	100	80	1,330
Employee Compensation	\$31,278,000	\$3,000,000	\$2,440,000	\$36,718,000
Proprietor Income	\$4,719,000	\$575,000	\$530,000	\$5,824,000
Other Property Type Income	\$8,454,000	\$1,994,000	\$2,335,000	\$12,783,000
State & Local Taxes <sup>^</sup>	—	—	—	\$4,590,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

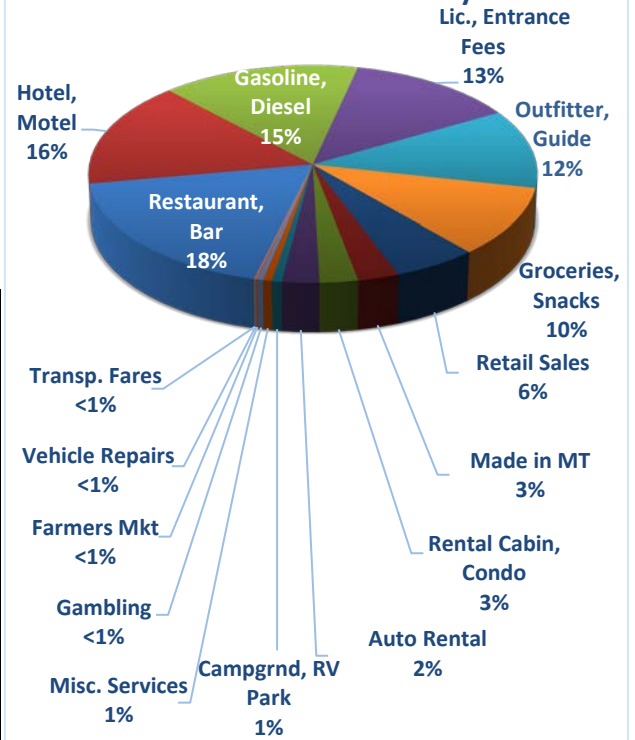
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Lewis and Clark County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Lewis and Clark



### 2019 Nonresident Expenditure Percentages in Lewis and Clark County



**Table 1 - Total Nonresident Spending in Lewis and Clark County\*,<sup>0</sup>**

Restaurant, Bar	\$25,410,000	Rental Cabin, Condo	\$3,543,000
Hotel, Motel	\$22,002,000	Auto Rental	\$3,443,000
Gasoline, Diesel	\$21,523,000	Campground, RV Park	\$926,000
Lic., Entrance Fees	\$18,250,000	Misc. Services	\$809,000
Outfitter, Guide	\$16,393,000	Gambling	\$440,000
Groceries, Snacks	\$14,165,000	Farmers Market	\$273,000
Retail Sales	\$7,781,000	Vehicle Repairs	\$74,000
Made in MT	\$3,808,000	Transportation Fares	\$63,000
<b>TOTAL</b>		<b>\$138,903,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Lewis and Clark County

- 2019 average spending\* in Lewis & Clark County by nonresident visitors to Montana totaled \$138.9 million.
- This \$138.9 million in local spending directly supports \$104.7 million of economic activity in the region, and supports an additional \$74.2 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$178.9 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$104,674,000	\$36,076,000	\$38,159,000	\$178,909,000
Employment (# of jobs)	1,580	270	300	2,150
Employee Compensation	\$39,232,000	\$7,769,000	\$10,572,000	\$57,573,000
Proprietor Income	\$3,346,000	\$2,020,000	\$1,687,000	\$7,053,000
Other Property Type Income	\$11,131,000	\$4,837,000	\$6,841,000	\$22,809,000
State & Local Taxes <sup>^</sup>	—	—	—	\$8,473,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

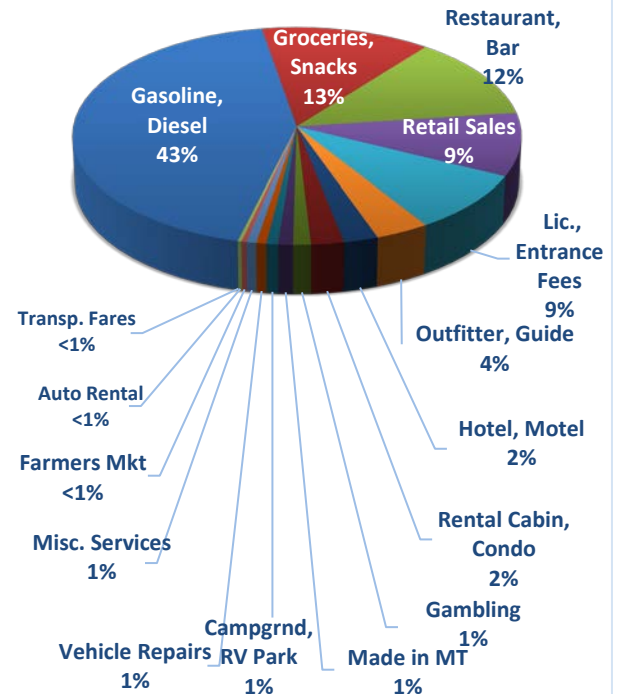
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Lincoln County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Lincoln



## 2019 Nonresident Expenditure Percentages in Lincoln County



**Table 1 - Total Nonresident Spending in Lincoln County\*,0**

Gasoline, Diesel	\$24,598,000	Gambling	\$665,000
Groceries, Snacks	\$7,517,000	Made in MT	\$556,000
Restaurant, Bar	\$7,026,000	Campground, RV Park	\$439,000
Retail Sales	\$5,320,000	Vehicle Repairs	\$376,000
Lic., Entrance Fees	\$4,907,000	Misc. Services	\$367,000
Outfitter, Guide	\$2,032,000	Farmers Market	\$189,000
Hotel, Motel	\$1,303,000	Auto Rental	\$142,000
Rental Cabin, Condo	\$1,234,000	Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$56,671,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Lincoln County

- 2019 average spending\* in Lincoln County by nonresident visitors to Montana totaled \$56.7 million.
- This \$56.7 million in local spending directly supports \$30.5 million of economic activity in the region, and supports an additional \$15.4 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$45.8 million.

**Table 2 - 2019 Economic Impact**

	Direct	Indirect	Induced	Combined
Industry Output	\$30,468,000	\$7,903,000	\$7,467,000	\$45,838,000
Employment (# of jobs)	420	60	70	550
Employee Compensation	\$10,649,000	\$1,077,000	\$1,688,000	\$13,414,000
Proprietor Income	\$1,770,000	\$388,000	\$325,000	\$2,483,000
Other Property Type Income	\$1,962,000	\$957,000	\$1,283,000	\$4,202,000
State & Local Taxes^	—	—	—	\$1,613,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

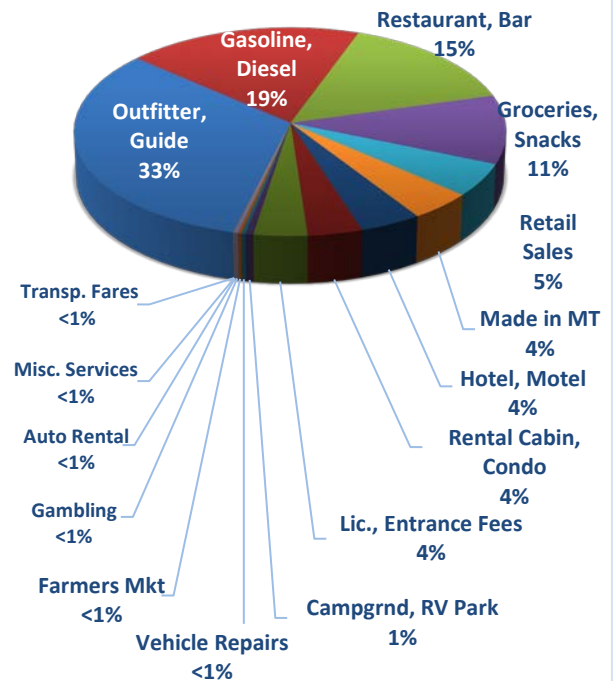
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Madison County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Madison County



### 2019 Nonresident Expenditure Percentages in Madison County



**Table 1 - Total Nonresident Spending in Madison County<sup>\*,0</sup>**

Outfitter, Guide	\$22,928,000	Lic., Entrance Fees	\$2,597,000
Gasoline, Diesel	\$13,434,000	Campground, RV Park	\$379,000
Restaurant, Bar	\$10,647,000	Vehicle Repairs	\$196,000
Groceries, Snacks	\$7,503,000	Farmers Market	\$171,000
Retail Sales	\$3,596,000	Gambling	\$128,000
Made in MT	\$3,081,000	Auto Rental	\$71,000
Hotel, Motel	\$2,996,000	Misc. Services	\$18,000
Rental Cabin, Condo	\$2,665,000	Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$70,410,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Madison County

- 2019 average spending\* in Madison County by nonresident visitors to Montana totaled \$70.4 million.
- This \$70.4 million in local spending directly supports \$51.4 million of economic activity in the region, and supports an additional \$24.3 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$75.7 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$51,377,000	\$13,886,000	\$10,409,000	\$75,672,000
Employment (# of jobs)	880	90	80	1,050
Employee Compensation	\$20,900,000	\$2,353,000	\$2,701,000	\$25,954,000
Proprietor Income	\$2,652,000	\$787,000	\$381,000	\$3,820,000
Other Property Type Income	\$2,606,000	\$2,341,000	\$2,090,000	\$7,037,000
State & Local Taxes <sup>^</sup>	—	—	—	\$3,469,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.



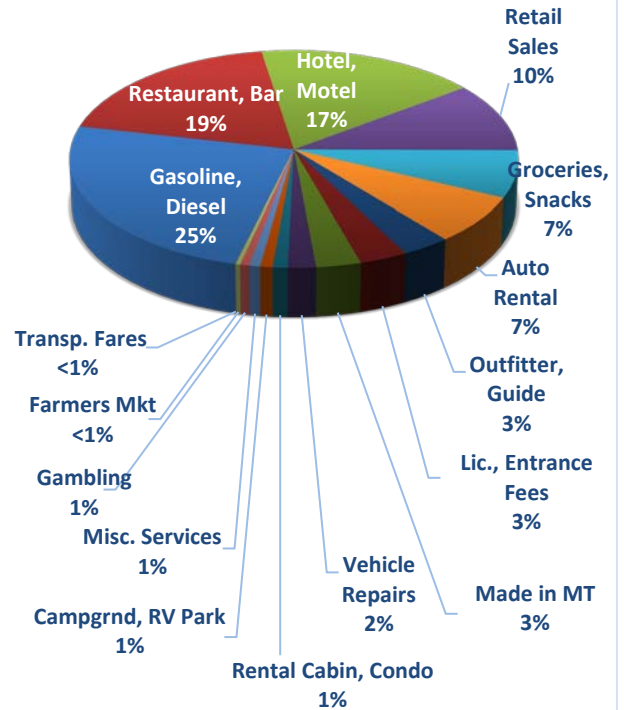
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Missoula County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Missoula County



### 2019 Nonresident Expenditure Percentages in Missoula County



**Table 1 - Total Nonresident Spending in Missoula County\*,<sup>0</sup>**

Gasoline, Diesel	\$69,856,000	Made in MT	\$8,463,000
Restaurant, Bar	\$53,977,000	Vehicle Repairs	\$5,255,000
Hotel, Motel	\$48,984,000	Rental Cabin, Condo	\$2,834,000
Retail Sales	\$29,484,000	Campground, RV Park	\$2,331,000
Groceries, Snacks	\$19,896,000	Misc. Services	\$2,043,000
Auto Rental	\$19,858,000	Gambling	\$1,742,000
Outfitter, Guide	\$9,238,000	Farmers Market	\$844,000
Lic., Entrance Fees	\$9,096,000	Transportation Fares	\$149,000
<b>TOTAL</b>		<b>\$284,050,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Missoula County

- 2019 average spending\* in Missoula County by nonresident visitors to Montana totaled \$284.1 million.
- This \$284.1 million in local spending directly supports \$205.0 million of economic activity in the region, and supports an additional \$155.1 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$360.1 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$205,032,000	\$77,649,000	\$77,441,000	\$360,122,000
Employment (# of jobs)	2,590	570	600	3,760
Employee Compensation	\$61,031,000	\$19,106,000	\$22,045,000	\$102,182,000
Proprietor Income	\$12,048,000	\$4,318,000	\$4,128,000	\$20,494,000
Other Property Type Income	\$26,048,000	\$10,858,000	\$13,981,000	\$50,887,000
State & Local Taxes <sup>^</sup>	—	—	—	\$19,698,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.

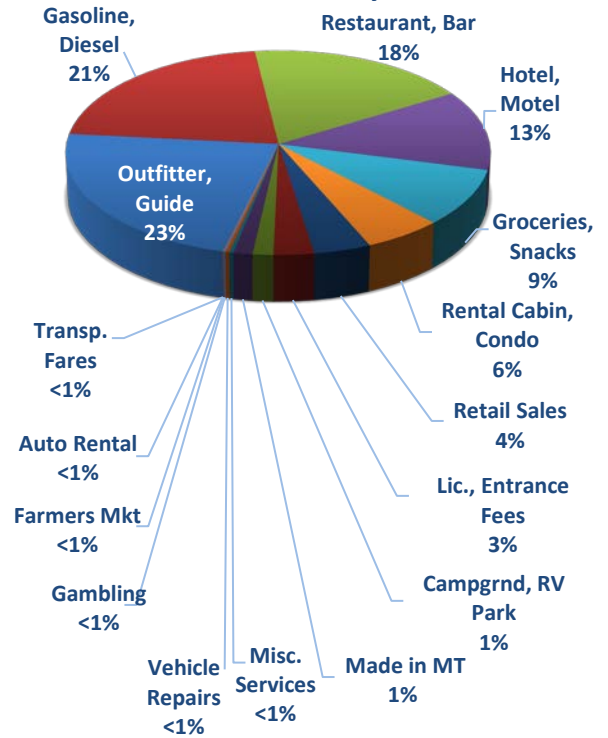
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Park County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Park County



### 2019 Nonresident Expenditure Percentages in Park County



**Table 1 - Total Nonresident Spending in Park County\*<sup>0</sup>**

Outfitter, Guide	\$53,817,000	Campground, RV Park	\$3,414,000
Gasoline, Diesel	\$50,807,000	Made in MT	\$3,139,000
Restaurant, Bar	\$43,223,000	Misc. Services	\$702,000
Hotel, Motel	\$30,189,000	Vehicle Repairs	\$609,000
Groceries, Snacks	\$21,126,000	Gambling	\$332,000
Rental Cabin, Condo	\$13,187,000	Farmers Market	\$164,000
Retail Sales	\$9,496,000	Auto Rental	Insufficient Sample Size
Lic., Entrance Fees	\$6,687,000	Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$236,892,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Park County

- 2019 average spending\* in Park County by nonresident visitors to Montana totaled \$236.9 million.
- This \$236.9 million in local spending directly supports \$173.4 million of economic activity in the region, and supports an additional \$75.2 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$248.6 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$173,376,000	\$39,587,000	\$35,635,000	\$248,598,000
Employment (# of jobs)	2,590	370	310	3,270
Employee Compensation	\$71,947,000	\$6,138,000	\$8,746,000	\$86,831,000
Proprietor Income	\$7,729,000	\$3,665,000	\$1,960,000	\$13,354,000
Other Property Type Income	\$12,897,000	\$4,431,000	\$7,405,000	\$24,733,000
State & Local Taxes <sup>^</sup>	—	—	—	\$11,112,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.

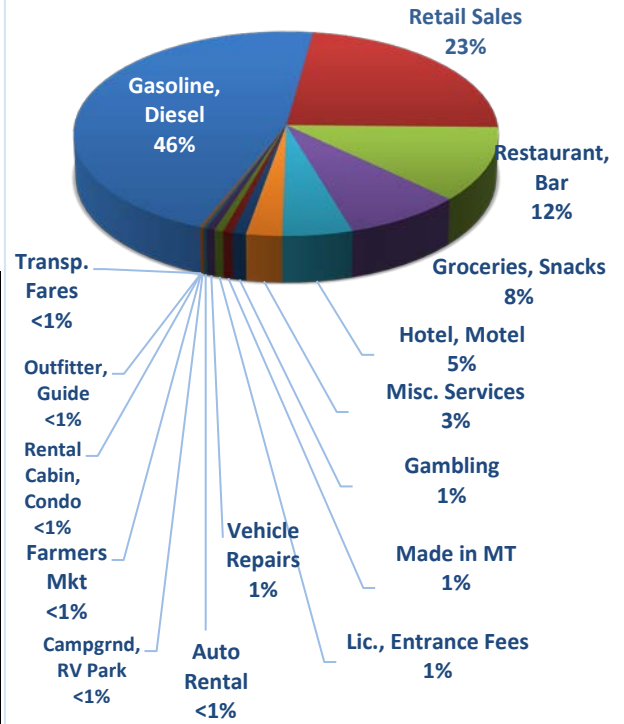
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Richland County

by Kara Grau, M.S.

## 2016 Nonresident Traveler Expenditures in Richland County



## 2019 Nonresident Expenditure Percentages in Richland County



**Table 1 - Total Nonresident Spending in Richland County<sup>\*,0</sup>**

Gasoline, Diesel	\$41,570,000	Lic., Entrance Fees	\$558,000
Retail Sales	\$20,883,000	Vehicle Repairs	\$539,000
Restaurant, Bar	\$10,589,000	Auto Rental	\$226,000
Groceries, Snacks	\$7,502,000	Campground, RV Park	\$190,000
Hotel, Motel	\$4,442,000	Farmers Market	\$8,000
Misc. Services	\$2,259,000	Rental Cabin, Condo	\$5,000
Gambling	\$858,000	Outfitter, Guide	Insufficient Sample Size
Made in MT	\$611,000	Transportation Fares	Insufficient Sample Size
<b>TOTAL</b>		<b>\$90,240,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Richland County

- 2019 average spending\* in Richland County by nonresident visitors to Montana totaled \$90.2 million.
- This \$90.2 million in local spending directly supports \$63.9 million of economic activity in the region, and supports an additional \$22.1 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$86.1 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$63,950,000	\$11,097,000	\$11,023,000	\$86,070,000
Employment (# of jobs)	410	60	80	550
Employee Compensation	\$13,688,000	\$2,641,000	\$2,738,000	\$19,067,000
Proprietor Income	\$4,027,000	\$798,000	\$727,000	\$5,552,000
Other Property Type Income	\$6,836,000	-\$36,000	\$2,071,000	\$8,871,000
State & Local Taxes <sup>^</sup>	—	—	—	\$4,383,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

◊Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.

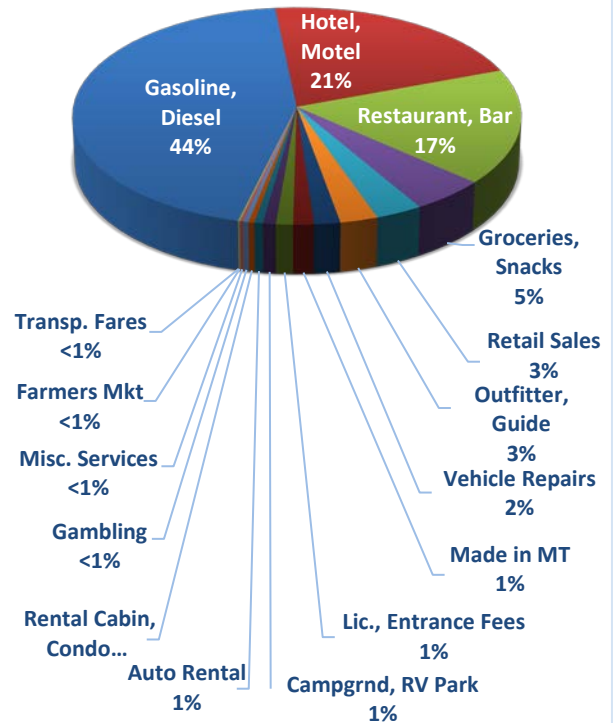
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Silver Bow County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Silver Bow County



### 2019 Nonresident Expenditure Percentages in Silver Bow County



**Table 1 - Total Nonresident Spending in Silver Bow County\***

Gasoline, Diesel	\$44,194,000	Lic., Entrance Fees	\$1,125,000
Hotel, Motel	\$20,901,000	Campground, RV Park	\$852,000
Restaurant, Bar	\$17,052,000	Auto Rental	\$564,000
Groceries, Snacks	\$4,947,000	Rental Cabin, Condo	\$380,000
Retail Sales	\$3,116,000	Gambling	\$352,000
Outfitter, Guide	\$2,498,000	Misc. Services	\$225,000
Vehicle Repairs	\$1,740,000	Farmers Market	\$120,000
Made in MT	\$1,353,000	Transportation Fares	\$18,000
<b>TOTAL</b>		<b>\$99,437,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Silver Bow County

- 2019 average spending\* in Silver Bow County by nonresident visitors to Montana totaled \$99.4 million.
- This \$99.4 million in local spending directly supports \$59.3 million of economic activity in the region, and supports an additional \$39.5 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$98.8 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$59,274,000	\$19,420,000	\$20,057,000	\$98,751,000
Employment (# of jobs)	770	150	160	1,080
Employee Compensation	\$18,034,000	\$4,651,000	\$5,267,000	\$27,952,000
Proprietor Income	\$5,799,000	\$1,583,000	\$1,590,000	\$8,972,000
Other Property Type Income	\$5,892,000	\$1,982,000	\$3,318,000	\$11,192,000
State & Local Taxes^	—	—	—	\$4,706,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

♦Expenditure category totals may not add to overall total due to rounding. ^ Comparison to previous years is not advised.



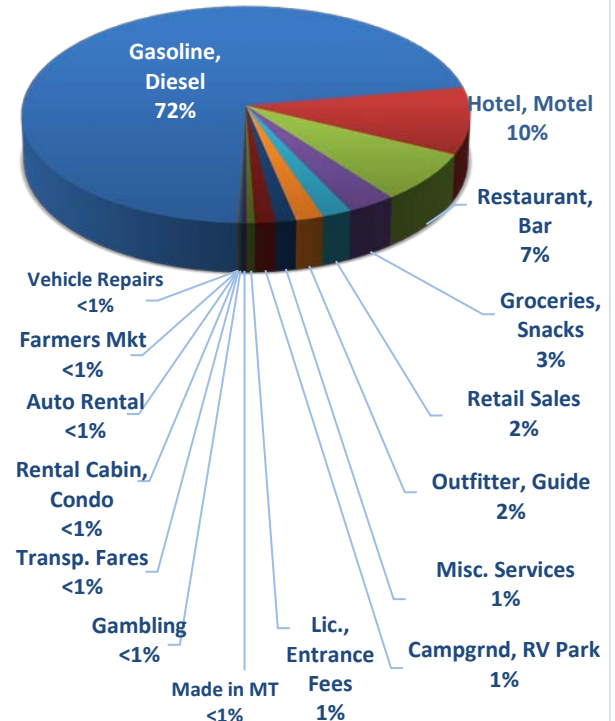
# 2019 Nonresident Traveler Expenditures & Economic Contribution in Toole County

by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Toole County



### 2019 Nonresident Expenditure Percentages in Toole County



**Table 1 - Total Nonresident Spending in Toole County<sup>\*,0</sup>**

Gasoline, Diesel	\$40,411,000	Lic., Entrance Fees	\$303,000
Hotel, Motel	\$5,621,000	Made in MT	\$187,000
Restaurant, Bar	\$4,155,000	Gambling	\$109,000
Groceries, Snacks	\$1,849,000	Transportation Fares	\$39,000
Retail Sales	\$1,103,000	Rental Cabin, Condo	\$6,000
Outfitter, Guide	\$1,030,000	Auto Rental	Insufficient Sample Size
Misc. Services	\$771,000	Farmers Market	Insufficient Sample Size
Campground, RV Park	\$765,000	Vehicle Repairs	Insufficient Sample Size
<b>TOTAL</b>		<b>\$56,349,000</b>	

## 2019 Contribution of Nonresident Traveler Expenditures in Toole County

- 2019 average spending\* in Toole County by nonresident visitors to Montana totaled \$56.3 million.
- This \$56.3 million in local spending directly supports \$33.4 million of economic activity in the region, and supports an additional \$10.4 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$43.7 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$33,358,000	\$6,979,000	\$3,381,000	\$43,718,000
Employment (# of jobs)	330	40	20	390
Employee Compensation	\$8,868,000	\$1,361,000	\$700,000	\$10,929,000
Proprietor Income	\$381,000	\$447,000	\$149,000	\$977,000
Other Property Type Income	\$554,000	\$649,000	\$896,000	\$2,099,000
State & Local Taxes <sup>^</sup>	—	—	—	\$3,484,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

<sup>0</sup>Expenditure category totals may not add to overall total due to rounding. <sup>^</sup> Comparison to previous years is not advised.

# 2019 Nonresident Traveler Expenditures & Economic Contribution in Yellowstone County

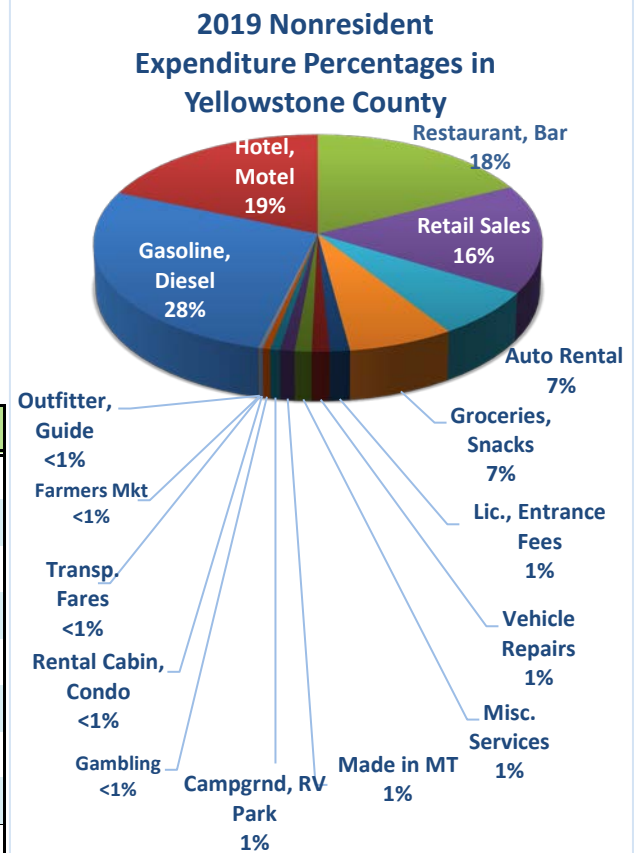
by Kara Grau, M.S.

## 2019 Nonresident Traveler Expenditures in Yellowstone County



**Table 1 - Total Nonresident Spending in Yellowstone County<sup>\*,0</sup>**

Gasoline, Diesel	\$86,042,000	Misc. Services	\$3,476,000
Hotel, Motel	\$58,142,000	Made in MT	\$3,023,000
Restaurant, Bar	\$54,934,000	Campground, RV Park	\$2,089,000
Retail Sales	\$50,678,000	Gambling	\$1,523,000
Auto Rental	\$22,027,000	Rental Cabin, Condo	\$539,000
Groceries, Snacks	\$22,004,000	Transportation Fares	\$155,000
Lic., Entrance Fees	\$4,185,000	Farmers Market	\$120,000
Vehicle Repairs	\$3,699,000	Outfitter, Guide	Insufficient Sample Size
<b>TOTAL</b>		<b>\$312,636,000</b>	



## 2019 Contribution of Nonresident Traveler Expenditures in Yellowstone County

- 2019 average spending\* in Yellowstone by nonresident visitors to Montana totaled \$312.6 million.
- This \$312.6 million in local spending directly supports \$250.4 million of economic activity in the region, and supports an additional \$150.8 million of economic activity, indirectly.
- The total contribution of nonresident spending to the regional economy was \$401.1 million.

Table 2 - 2019 Economic Impact	Direct	Indirect	Induced	Combined
Industry Output	\$250,355,000	\$77,353,000	\$73,412,000	\$401,120,000
Employment (# of jobs)	2,440	500	540	3,480
Employee Compensation	\$67,065,000	\$18,785,000	\$21,155,000	\$107,005,000
Proprietor Income	\$7,752,000	\$5,500,000	\$3,364,000	\$16,616,000
Other Property Type Income	\$35,611,000	\$10,341,000	\$14,002,000	\$59,954,000
State & Local Taxes <sup>^</sup>	—	—	—	\$17,549,000

**Direct impacts** result from nonresident traveler purchases of goods and services; **Indirect impacts** result from purchases made by travel-related businesses; and **Induced impacts** result from purchases by those employed in travel-related occupations.

**Industry Output** is the value of goods & services produced by an industry which nonresidents purchase. **Employment** is full- and part-time average annual jobs. **Other Property Type Income** consists of payments for rents, royalties and dividends.

\*Data is collected at the state level. The two-year average of expenditures (2019 \$s) was used to help account for small and varying sample sizes at the county level.

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# 2019 Economic Contribution of Nonresident Travel Spending in Montana Travel Regions and Counties

2020

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